



The State of Search in 2025

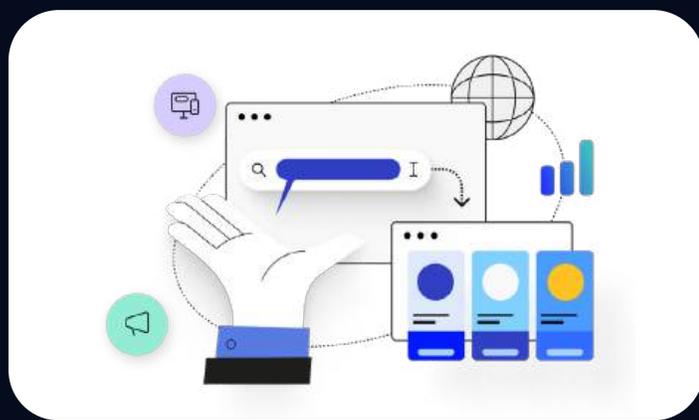


Introduction

Understanding consumer purchasing decisions and search behavior is crucial for brands aiming to stay competitive, grow their customer base, and scale their business. adMarketplace conducted a survey of 1,000 U.S. consumers to shed light on these trends and forecast what brands can expect in 2025.

OUR FINDINGS REVEAL A DYNAMIC SHIFT:

modern consumers are searching more and more outside of traditional search engines and are embracing native search experiences.



They are relying on product links on review sites and searching on alternative browsers to discover new brands and products by engaging with native search ads that seamlessly integrate into the user experience of these platforms. Further, younger generations are leading the charge towards making purchases on emerging channels like TikTok Shop and buy now, pay later (BNPL) apps.

Consumers are also increasingly turning to online ads to find products and brands they would not have otherwise found, and are hungry for more relevant results when searching online. For brands to reach today's consumers, it's imperative that they keep a pulse on consumer behavior and intent. Utilizing these trends and signals will empower brands to create engaging native search experiences that produce highly relevant results.

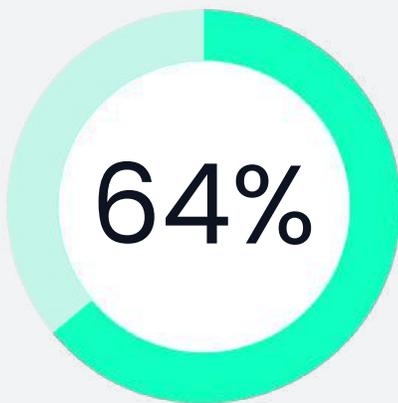
Advertisers must think beyond the legacy search engine results page (SERP) and embrace open web channels and other emerging platforms where consumers are actively searching and shopping.

In doing so, brands can boost awareness, foster loyalty, and drive purchasing decisions in 2025 and beyond.

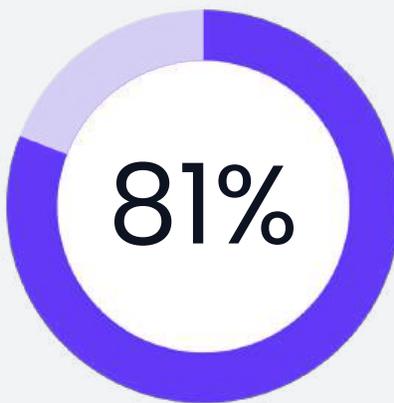
Key Stats



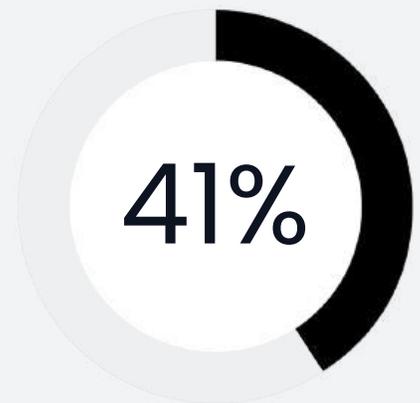
Modern Consumer Behaviors



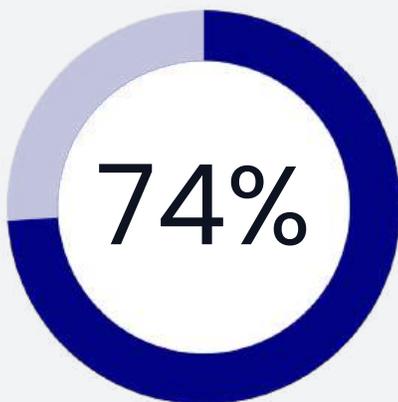
find a new product and purchase it in the same place



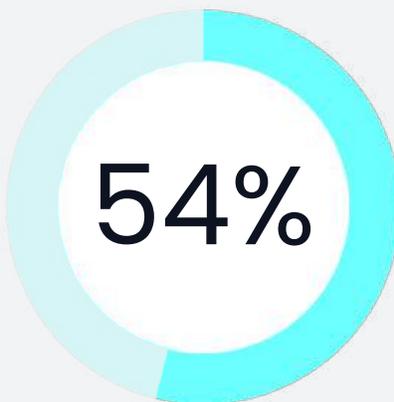
find new products or brands on mobile devices



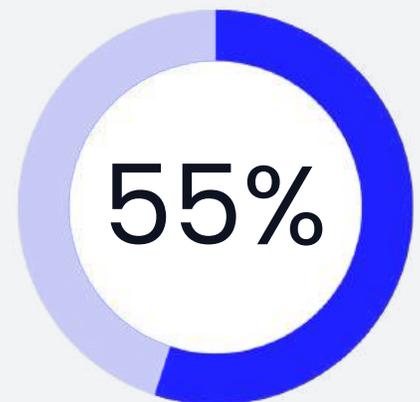
rely on relevant results to find new products or brands when they search



have purchased a product after seeing an ad



say they trust a brand after seeing multiple ads for it across different platforms



say the way they search for information about products or brands has changed



The New Power Channels: BNPL, Alternative Browsers, and Review Sites

45%



are open to making purchases on lesser-known or new platforms

51%



have used BNPL apps

60%



of BNPL users say using BNPL apps helped them discover new brands or products

48%



use an Internet browser other than Google Chrome or Apple Safari

74%



have purchased a product by clicking on a product ad or link after exploring the product on an editorial or review site



Evolution of Discovery & Purchasing Behaviors

Importance of Open Web Experiences

Over half (55%) of Americans say the way they search for information about products or brands has changed over the last five years. This finding comes as no surprise given emerging technologies like generative AI are impacting consumer search habits.

Diversifying search media and incorporating emerging platforms will help companies make their brand and products more discoverable on the open web, enabling them to gain market share and share of voice.

Today's consumers discover new products and brands through a variety of ways, with nearly half (44%) discovering new products or brands through online ads and one-third (33%) discovering new products through search engines. These findings represent an opportunity for brands to use open web channels to capture the attention of additional consumers beyond more traditional methods.

The majority (81%) of Americans find new products or brands on mobile devices; this finding is true across generations. Also notable is that nearly two-thirds (64%) of Americans typically find a new product and purchase it in the same place.

How do you discover new products? Top 6 channels

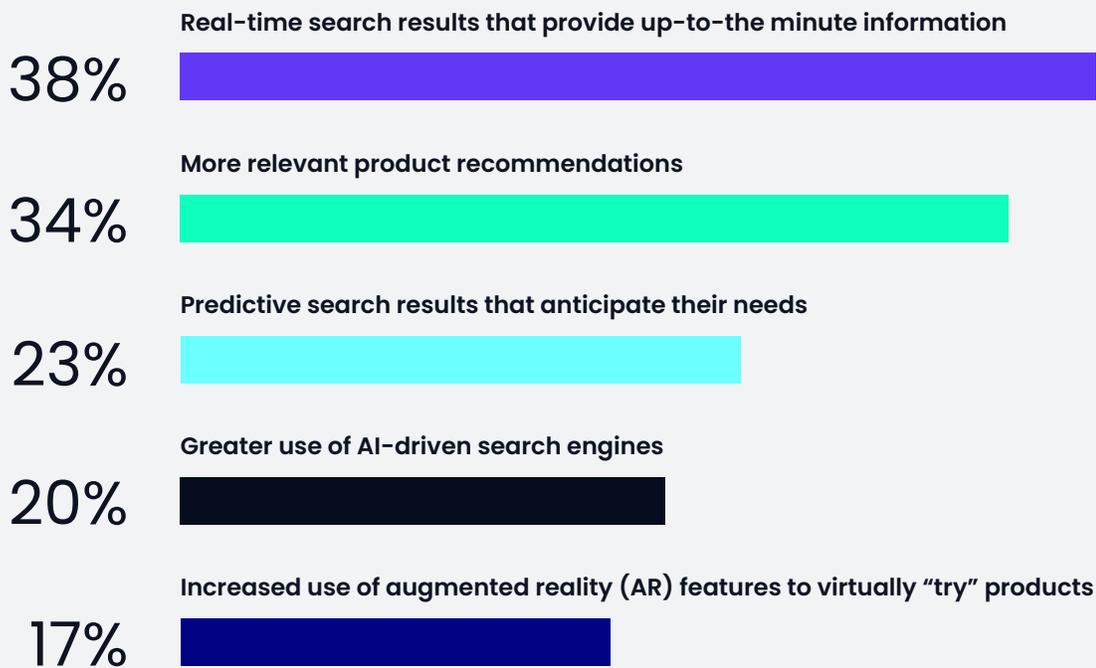
	Gen Z	Millennials	Gen X	Baby Boomers + Silent Gen
Social media	77%	70%	52%	29%
In-person retail stores	45%	51%	53%	60%
Word of mouth	47%	48%	50%	56%
Online retail websites	51%	49%	41%	43%
Online ads	49%	45%	46%	35%
Search engines	34%	40%	36%	24%

A Need for More Real-Time and Relevant Results

Consumers want to see more immediate and relevant search results. About two in five (41%) consumers currently rely on relevant results to find new products or brands when they search, and this trend is projected to continue as more innovative search experiences are developed.

Organizations need to prioritize updating information across channels – including the brand website, social media profiles and posts, and online advertisements – to give consumers the real-time information they seek. Marketers and advertisers should also ensure their organizations are leveraging insights and analytics to understand consumer behavior, which will ultimately help them drive consumer intent toward their brands and products.

Top 5 ways consumers would like to see their search experience change in the future:



In sum, brands must invest in innovative native search strategies to ensure relevant results and engaging experiences for consumers.

The Impact of Ads

Ads play an important role in brand and product discovery. After seeing an ad, more than two in five (42%) Americans say they often¹ search for more information about the product. Further, almost seven in 10 (68%) Americans say ads are helpful² for discovering products they might not have searched for otherwise.

These trends are even higher among Gen Z and Millennials, indicating that ads can be a great tool for brands to employ to encourage younger generations to purchase their products and offerings.

68% say ads are helpful for discovering products they might not have searched for otherwise.

Ads also influence one of the most important steps in the customer journey: purchasing. Most (74%) Americans across generations say they have purchased a product after seeing an ad. Americans who purchased a product after seeing an ad say they bought the product because the ad was what they needed at that time (45%), visually appealing (31%), and persuasive (31%).

74% have purchased a product after seeing an ad.

Brands should also focus on leveraging ads across platforms. Over half (54%) of Americans say they are likely³ to trust a brand after seeing multiple ads for it across different platforms. This finding is notable given the positive link between consumer trust and action.

Data from **Forrester** has shown that a “consumer’s level of trust in a company drives revenue-generating behaviors, such as the likelihood to purchase again, preference for a company over competitors, trial of unrelated products, and propensity to share personal data.”

Companies who are exploring leveraging AI to generate ads or placing ads in AI environments should be aware of consumer sentiment around the technology’s use in advertising. Most (**83%**) consumers think it should be legally required for companies to label AI-generated content. This type of transparency works in the favor of companies, as a **Statista** study found that ads were more appealing to consumers and consumers were more likely to trust a company when the ad included a disclosure of AI usage.

The remaining sections will explore three critical platforms that brands looking to expand their market share and reach new audiences should be focusing on in 2025 within their advertising strategy: BNPL apps, alternative browsers, and editorial or review sites.

-
- 1 Always / Often
 - 2 Very helpful / Helpful
 - 3 Very likely / Likely

Buy Now, Pay Later Apps

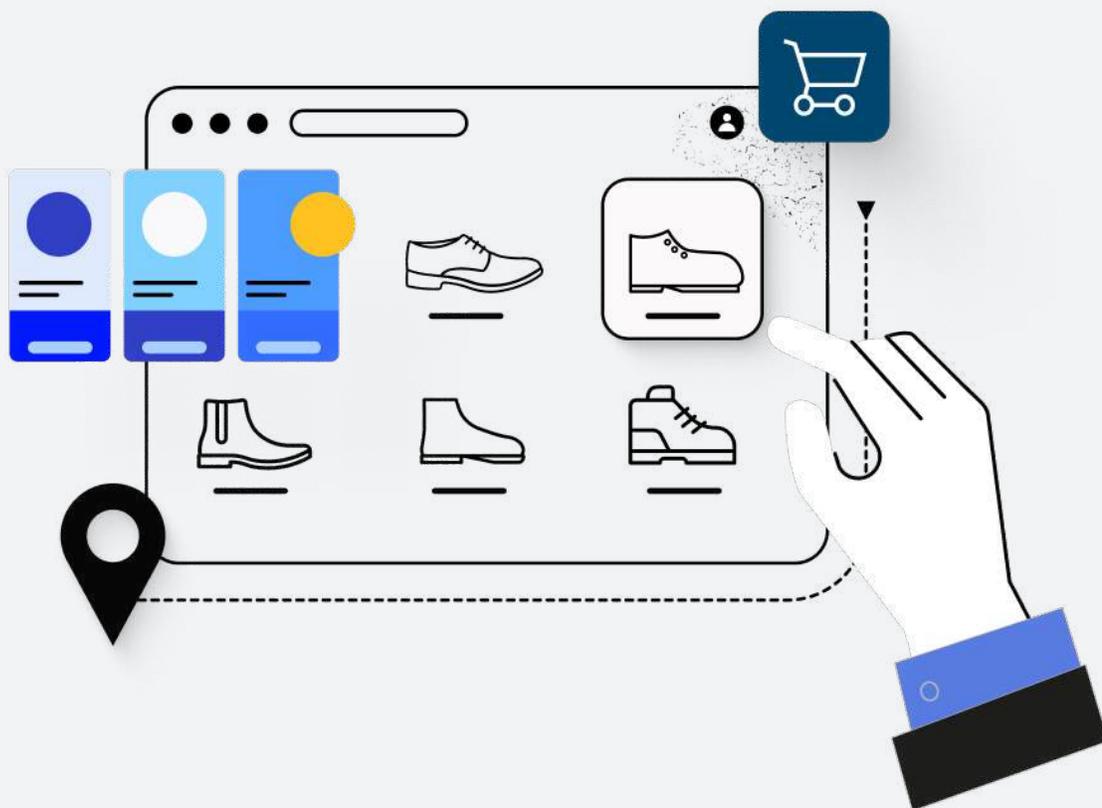
Convenient and Easy Way to Find and Purchase Products

BNPL apps, which allow individuals to pay off purchases over time through split payments, have become popular among consumers due to their ease of use and increasing the customer's buying power. One **forecast** estimates that the number of BNPL users globally could double by 2027, reaching 900 million, and expects the industry to reach \$3.27 trillion by 2030.

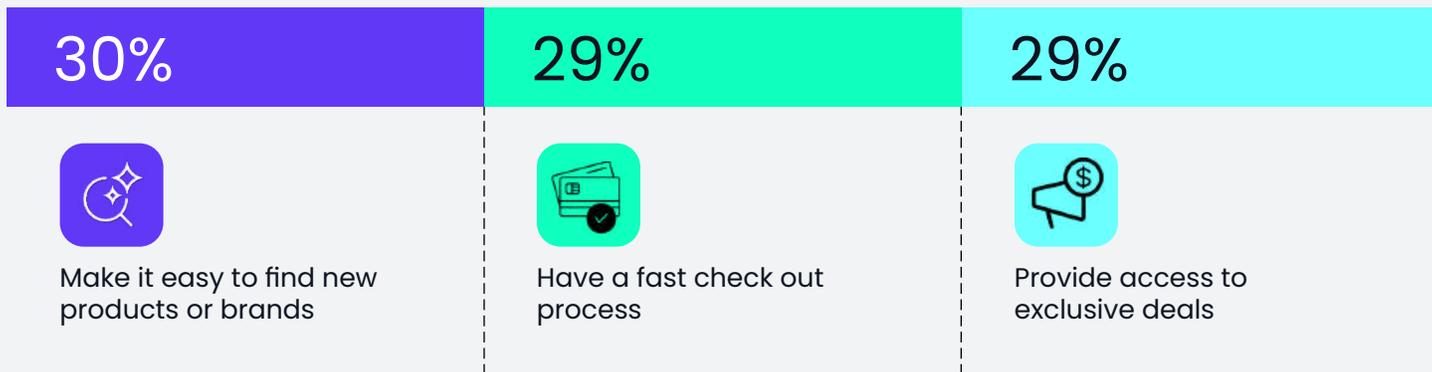
Our survey found that half (51%) of Americans have used BNPL apps. Given the rising popularity of BNPL apps, brands must diversify their media portfolio to include BNPLs, especially if they want to reach younger consumers.

51%

of Americans have used
BNPL apps



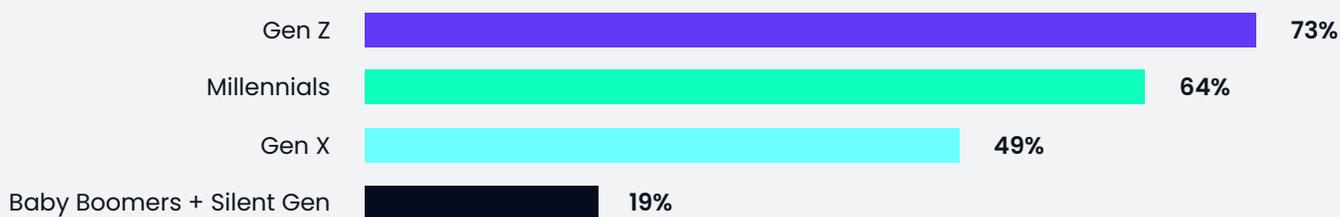
BNPL apps have become popular for several reasons including enabling flexible spending for small and large purchases, lack of credit check requirements, lack of compounding interest, and security of payments. Further, consumers enjoy using BNPL apps because they:



BNPL is not only reshaping how people pay but influencing *what* they buy. Many consumers have reported that the option to “buy now, pay later” encouraged them to make unplanned purchases or upgrade to more premium items, knowing they could split payments over time. Indeed, half (51%) of consumers who use BNPL apps make a purchase after finding a product on the app within just a few hours.

The top BNPL apps among Americans are Afterpay, Klarna, and Affirm. Of the 51% of consumers that use BNPL apps, 32% report using them often⁴. Usage is even higher among **younger generations**, likely due to their enthusiasm toward emerging technologies and familiarity with online shopping platforms. Three in five Gen Z (61%) and Millennials (63%) report feeling comfortable⁵ making purchases using lesser-known platforms like BNPL apps.

BNPL App Usage by Generation



BNPL apps can also help expose brands to new potential customers. In fact, three in five (60%) BNPL users say using BNPL apps helped them discover new brands or products.

BNPL users have used these apps to learn about new products or brands through browsing promotional deals (35%), clicking on ads that interest them (31%), searching for specific brands or products (31%), and browsing specific product categories (31%).

⁴ Always / Often

⁵ Very comfortable / Comfortable

Internet Browsers

The Power of Alternative Browsers

Searching the internet has become largely synonymous with Google. But that's beginning to change, **as evidenced** by Google's market share falling below 90% for the first time since 2015 in Q4 '24.

Many modern consumers use multiple internet browsers, making alternative browsers a valuable way to get in front of consumers before they ever reach Google search results.

48%
use alternative web
browsers regularly

Nearly half (48%) of American consumers say they often⁶ use an Internet browser other than Google Chrome or Apple Safari. Further, over three-quarters (78%) of alternative browser users say these browsers have helped them discover new brands or products.

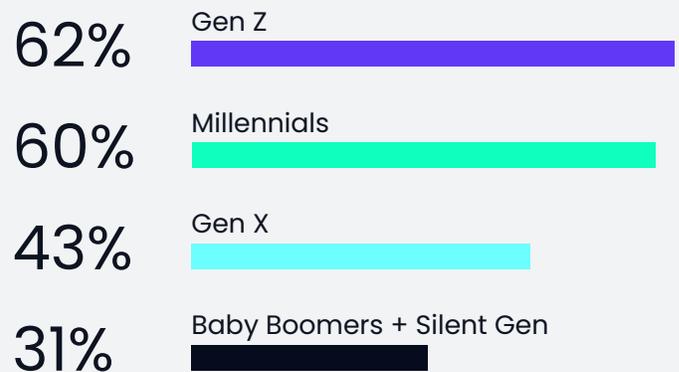
6 Always / Often

7 Always / Often

Individuals who use alternate Internet browsers report using Firefox (21%) and DuckDuckGo (14%) in addition to Google Chrome and Safari. This variety highlights the need for brands to optimize the consumer experience across channels and platforms. Creating valuable search advertising programs should not be limited to solely one or two types of browsers.

Gen Z (62%) and Millennials (60%) are most likely to be alternative browser users⁷, making paid search programs on alternative browsers a critical investment for brands looking to reach younger consumers.

Alternative Browser Usage by Generation



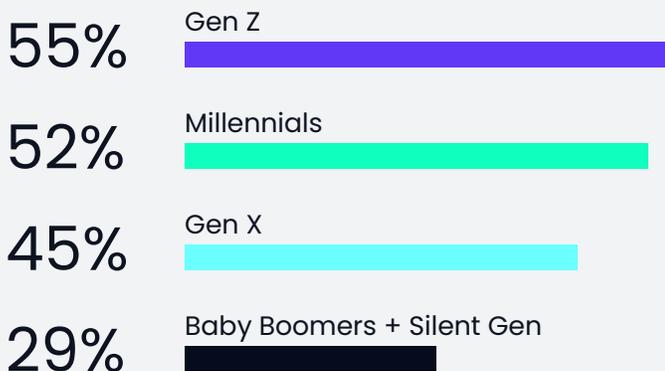
Alternative browser users value speed and relevant results from their searches. The top reasons for using their preferred browsers are ease of use (62%), fast load times (41%), and relevant results (35%). This finding is of great importance, especially when consumers are trying to make a purchase quickly. Over half of Gen Z (54%) and half of Millennials (50%) say they tend to purchase within a few hours once they find a product or brand on an alternative browser.

Editorial Sites

An Underused Channel for Driving Purchases

Editorial sites are an often overlooked and undervalued marketing channel. Brands can further diversify their search media with product links that reach consumers as they're researching price points, features, and reviews on these sites to drive traffic and conversions directly to their site. Nearly half (45%) of Americans, especially younger consumers, have used editorial or review sites to discover new products or brands.

Editorial or Review Site Usage by Generation



Consumers most often consult editorial or review sites for technology (50%), food and beverage (40%), and health and wellness (40%) products. They use these sites primarily for price comparisons (52%) and real-life product reviews (50%).

In addition to product discovery, editorial sites are also a valuable tool for driving purchases. Nearly half (49%) of Americans purchase a product after seeing it on an editorial or review site within just a few hours or less. Further, three-quarters (74%) have purchased a product by clicking on a product ad or link after exploring the product on an editorial or review site. Gen Z (84%), Millennials (77%), and Gen X (75%) are especially likely to have purchased a product from these links in comparison to Baby Boomers and the Silent Generation (49%).

74%
have purchased a product by clicking on a product ad or link after exploring the product on an editorial or review site

Consumers find these sites valuable due to the presence of reviews, which can help inform purchase decisions. Nearly three-quarters (74%) have purchased a new brand or product that they would not have typically bought after reading a review. Similarly, younger generations are more likely to have made these purchases compared to Baby Boomers.

Conclusion

Our research reveals that consumers are increasingly relying on a diverse array of methods to discover new brands and products. They are not just limited to traditional search engines but are also exploring alternative browsers, editorial and review sites, and BNPL apps.

This shift from legacy search to native search is particularly pronounced among younger generations who are more open to new and emerging platforms. Additionally, the importance of relevant search results and the influence of ads and product links on review sites in driving purchases cannot be overstated. These findings underscore the evolving nature of consumer behavior and the need for brands to stay attuned to these changes.

For advertisers and brands, the takeaway is clear: diversifying your search media beyond the legacy search engine results page (SERPs) is necessary.

By reaching consumers with more relevant ads and results across various platforms, brands can enhance their visibility and appeal. Embracing native search experiences and leveraging the power of review sites, alternative browsers, and BNPL apps will be essential in capturing the attention of modern consumers.

Brands that adopt an open web channels approach – integrating editorial reviews, social media, and emerging platforms into their advertising strategies – will be better positioned to increase brand awareness, build loyalty, and drive purchasing behaviors in the competitive landscape of 2025.

Methodology

adMarketplace commissioned TEAM LEWIS to survey 1,000 individuals in the United States. The sample was representative of the population in terms of gender and age. The survey was fielded from October 16 to 22, 2024. Respondents were recruited by Veridata, a leading online data collection and market research services provider.



About adMarketplace

adMarketplace is the leader in native search advertising. For over two decades, adMarketplace has delivered relevant search advertising to consumers who skip the legacy search results page. The world's largest search advertisers drive measurably incremental results from adMarketplace's exclusive media opportunities across the internet's leading browsers, shopping apps, and editorial sites on the open web. adMarketplace's mission is to shape the consumer journey with relevant native search ads and measure media value transparently to deliver performance at scale.